



Umpqua Community College
 Financial Aid Office
 PO Box 967
 Roseburg, Oregon 97470
 541.440.4602 | 541.440.4612 (FAX)
 FinancialAid@umpqua.edu

2021-2022
Special Circumstances Request
(Using 2021 Income)

Student Name _____ Student ID _____

Mailing Address _____ City _____ State _____ Zip _____

Phone _____ Alternate/Message Phone _____

This request is used when the income reported on the 2021-2022 FAFSA is greater than the expected income for 2021, due to a change in financial circumstances beyond the student’s control. This does not include personal choice situations. *(Personal choices, while they may be well intended, do not constitute extenuating circumstances for which the student has no control.)*

Step 1 – ALL STUDENTS MUST SUBMIT THE FOLLOWING DOCUMENTATION

- Attach a detailed signed statement explaining your change in income, including dates.**

- Attach last paystub(s) received**

YOUR REQUEST WILL NOT BE REVIEWED WITHOUT DOCUMENTATION

Step 2 – CIRCUMSTANCES TO BE CONSIDERED (Check One)

<input type="checkbox"/> Loss of Employment	<input type="checkbox"/> Loss of Benefits	<input type="checkbox"/> Death of Parent (dependent students only)
<input type="checkbox"/> Unusual Expenses	<input type="checkbox"/> Deduction of a One-Time Payment	<input type="checkbox"/> Other (List and provide documentation)

Step 3 – IN ADDITION TO THE ABOVE, THE FOLLOWING DOCUMENTATION IS REQUIRED

<p>LOSS OF EMPLOYMENT – Student/Parent was working during 2019, but is now working fewer hours or is unemployed.</p> <ul style="list-style-type: none"> ⇒ Verification of 2021 Unemployment benefits being received ⇒ Last pay stub received for 2021 ⇒ Spouse’s financial information, if applies 	<p>LOSS OF BENEFITS – (i.e. Child Support or Social Security) Student/Parent has lost some or all benefits.</p> <ul style="list-style-type: none"> ⇒ Last check stub(s) or printout of benefit(s) received ⇒ Letter from agency verifying date and amount of benefit(s) lost
<p>DEDUCTION OF ONE-TIME PAYMENT – Student/Parent received a ONE-TIME PAYMENT (Pension, IRA, Annuities, Gambling Winning, Settlement, Capital Gains, etc.) Copy of <u>1099R</u></p> <ul style="list-style-type: none"> ⇒ Letter explaining the nature of the one-time payment ⇒ Explanation of how one-time payment was spent 	<p>DEATH OF A PARENT – Parent passed away after the FAFSA was filed.</p> <ul style="list-style-type: none"> ⇒ Documentation of death (Death Certificate)
<p>ADDITIONAL/UNUSUAL EXPENSES – Student/Parent has unusual medical/dental expenses not covered by insurance, Dependent/Elder Care expenses, and family paying private elementary/secondary school tuition or parent in college.</p> <ul style="list-style-type: none"> ⇒ Copy of paid receipts for elementary/secondary tuition, dependent care, etc. ⇒ Detailed breakdown of paid receipts for elder care, medical, etc. <p>NOTE: Medical/dental expenses up to 11% of the family’s income are taken into account by the federal needs analysis formula when determining financial aid eligibility. Therefore, only the portion of expenses which exceed 11% will be considered an unusual circumstance.</p>	



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INSTRUCTIONS FOR REDUCED INCOME

PLEASE NOTE: *You must submit the completed Special Circumstance form with all documentation.*

When you or your family have a change of income and request a change in eligibility based on the reduced figures for 2021 instead of the 2019 income filed on the FAFSA application, you must do several things:

1. Explain the reason for this request in a detailed signed statement.

Complete Step 4 (*the total of Actual YTD and Projected income should give a complete picture of earnings for 2021*).

In Step 4 "Actual YTD, from Jan 1 to _____",

- Enter the date you are filling out the form.
- Declare your households actual year-to-date (YTD) 2021 earnings from all jobs (i.e. yourself if single, yourself and spouse if married, or yourself and parents if you are dependent.)
- You must submit supporting documentation on all of the household earnings (see step 3).

In Step 4 "Projected, from _____ to Dec 31",

- Enter the date of the day after you are filling out the form. (e.g. If you put Mar. 3 above, put Mar. 4 here)
- Provide a "best estimate" of your households projected earnings for this period.
- Explain how you came up with these projected income figures in your attached explanation statement.

EXAMPLE of PROJECTED EARNINGS:

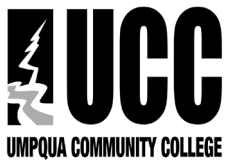
- ⇒ My spouse has worked at the same job all of 2021 and will continue to work at the same rate of pay. The total YTD earnings for my spouse are \$10,758 which covers 21 weeks. That is equal to \$512.29 per week (\$10,758 divided by 21 = \$512.29). Therefore, I project my spouse will make \$15,881 (\$512.29 x 31 remaining weeks.)
- ⇒ My household's total projected earnings are: Myself, \$4080 part-time earnings. My spouse will make \$15,881. Total projected earnings = \$19,961.

FINANCIAL AID OFFICE USE ONLY

Action Taken: Granted Not Granted

Reason/Rationale: _____

Financial Aid Administrator Signature _____ Date _____



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Step 4 – (Student)

Type of Income	Student/Spouse		Required Documentation
Earnings/Wages/Salaries (including any income from work, tips, severance/holiday pay, business/farm income, etc. ONLY) DO NOT INCLUDE UNEMPLOYMENT IN THIS SECTION	Actual YTD From Jan 1, 2021 to current	Projected Current to Dec 31, 2021	
	Student: \$	Student: \$	Final Pay Stub/Most recent Pay Stub. If no wages, printout from Employment Dept.
	Spouse: \$	Spouse: \$	Final Pay Stub/Most recent Pay Stub. If no wages, printout from Employment Dept.
Unemployment Earnings	Student/Spouse: \$	Student/Spouse: \$	Documentation for current year Unemployment Earnings
Taxable Income (Including rental income, taxable portions of pensions, etc.)	\$	\$	Statement from Agency providing interest income. Most recent balance sheet showing rental income
Child Support Received	\$	\$	Copies of cancelled checks. Printout from Child Support
Other Untaxed Income (Non-Education Veterans benefits, and Work-Study)	\$	\$	Document Non-Education Benefit and Work-Study
Disability/Workers Compensation	\$	\$	Documentation from Workers Compensation/Disability
Any Other Income	\$	\$	Document any other income
2020 SNAP Benefits	Yes <input type="checkbox"/>	No <input type="checkbox"/>	

Step 4 – (Parent)

Type of Income	Parent(s)		Required Documentation
Earnings/Wages/Salaries (including any income from work, tips, severance/holiday pay, business/farm income, etc. ONLY) DO NOT INCLUDE UNEMPLOYMENT IN THIS SECTION	Actual YTD From Jan 1, 2021 to current	Projected Current to Dec 31, 2021	
	Parent 1: \$	Parent 1: \$	Final Pay Stub/Most recent Pay Stub. If no wages, printout from Employment Dept.
	Parent 2: \$	Parent 2: \$	Final Pay Stub/Most recent Pay Stub. If no wages, printout from Employment Dept.
Unemployment Earnings	Parent: \$	Parent: \$	Documentation for current year Unemployment Earnings
Taxable Income (Including rental income, taxable portions of pensions, etc.)	\$	\$	Statement from Agency providing interest income. Most recent balance sheet showing rental income
Child Support Received	\$	\$	Copies of cancelled checks. Printout from Child Support
Other Untaxed Income (Non-Education Veterans benefits and Work-Study)	\$	\$	Document Non-Education Benefit and Work-Study
Disability/Workers Compensation	\$	\$	Documentation from Workers Compensation/Disability
Any Other Income	\$	\$	Document any other income
2020 SNAP Benefits	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Submit documentation of SNAP benefits

ATTACH ALL REQUIRED DOCUMENTATION
 This form will NOT be processed if documentation is not attached

Student Signature _____	Date _____
Spouse/Parent Signature _____	Date _____